



one CASE STUDY

Patry, Fisher & Dudley, P.C. Replaces Paper Procedures with Online, Visible Processes

Patry, Fisher & Dudley, P.C.

THE SITUATION

Tracking assets and liabilities goes well beyond the numbers. Like many CPA firms, their office had become overwhelmed with client files and paper. Following the end of another successful tax season, Patry, Fisher & Dudley, P.C. found that retrieving important documents in an expedient manner was a major area of concern and one they wanted to improve. The process of finding critical client information within the stacks of paper was tedious and expensive. They knew there had to be a better way.

THE SOLUTION

- SolutionOne performed an analysis of Patry, Fisher & Dudley, P.C.'s current processes and made the recommendation to launch Alchemy, document management system, to automate their paper file management and archival processes for their current back-up systems in place.
- Beginning with a operator back-scanning all paper files using a single MFP (Multifunction Product) from SolutionOne, documents begin their digital storage life on a dedicated server and are filed into specific databases created by Patry, Fisher & Dudley, P.C. in the Alchemy software.
- By implementing Alchemy for paper file management processes, Patry, Fisher & Dudley, P.C. employees are able to access current and archived client paperwork quickly and efficiently from a variety of different PC locations throughout the office.
- Using the Alchemy functionality, they are able to use the MFP to scan paper documents and create OCR (Optical Character Recognition) electronic files, which are stored on a server and are fully retrievable by any authorized user.
- With the guidance of SolutionOne's Professional Services Group, Patry, Fisher & Dudley, P.C. have achieved their ultimate goal for complete digital back-up storage and online access to all paper files from multiple user desktops and have the assurance of disaster recovery.

THE SUMMARY

Patry, Fisher & Dudley, P.C. wanted to improve the quality, consistency and visibility of its processes and that's where SolutionOne's document management solution shines. Data resources that were previously paper-based are now immediately accessible, which enables Patry, Fisher & Dudley, P.C. to offer better client care in a fraction of the time. With fast and convenient access to information, employees are able to focus more on the client instead of clerical duties. Converting paper to digital files also allows Patry, Fisher & Dudley, P.C. to reduce physical storage space, decreasing the amount of supplies and time spent on an expensive to maintain paper-based filing system.

ABOUT PATRY, FISHER & DUDLEY, P.C.

Patry, Fisher & Dudley, P.C. was originally founded by Kenneth F. Patry and Michaela M. Fisher as Patry & Associates, P.C. in 1990 and changed its name to Patry, Fisher & Dudley, P.C. in 2002 when Phil L. Dudley, III became a partner in the firm.

Patry, Fisher & Dudley, P.C. is a small firm catering to the needs of closely-held business owners. Patry, Fisher & Dudley, P.C. believes in the value of strong relationships with a client. Patry, Fisher & Dudley, P.C. views every client relationship as a partnership and truly believes that any success Patry, Fisher & Dudley, P.C. may have is the end result of the client's success.

Patry, Fisher & Dudley, P.C. is committed to providing close, personal attention to all clients. Patry, Fisher & Dudley, P.C.'s continual investment of time and resources in professional continuing education, state-of-the-art computer technology and extensive business relationships is indicative of their commitment to excellence.

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